

PREMIUM ESTATE PLAN

This is the perfect estate plan for clients who want to protect their assets and save significant amounts of tax. It is appropriate for clients that have minor children (or grandchildren) to stream income through to. This estate plan is also suitable if you have vulnerable beneficiaries that need protection from themselves, creditors, predators or potential family law proceedings.



1. Initial estate planning meeting
2. Preparation of your Will including:
 - a. testamentary discretionary trust provisions
 - b. incorporation of a superannuation proceeds trust to capture any death benefits paid into your estate
 - c. the appointment of your executor/trustee/appointor and back-up executor/trustee/appointor
 - d. the appointment of a testamentary guardian and back-up guardian to look after any minor children
 - e. tailored estate planning advice with respect to your beneficiaries, including your spouse, children, grandchildren and others
 - f. tailored advice in relation to the number of trusts to set up and what assets to put into each trust
 - g. advice in relation to the provisions governing the trust
 - h. advice on a number of possibilities and traps that may arise and circumstances under which you should change your Will
 - i. advice to assist you to avoid intestacy, on whether your Will may result in a claim on your estate and if so what steps you should now take to deal with the possibility of that claim
 - j. disposal of body wishes (if any)
3. Preparation of your Power of Attorney
4. Preparation of your Enduring Guardianship
5. Complimentary Letter of Wishes Workbook
6. Complimentary review /update of your superannuation binding death benefit nominations (excludes SMSFs)
7. Complimentary signing meeting / preparation of signing instructions
8. Complimentary certified copies of your incapacity documents if they are required to be used
9. Complimentary storage of your original estate planning documents in our safe custody facility

Individual \$2,200 incl GST
Couple \$3,500 incl GST

Find out more with an obligation-free 15 minute discovery call 02 6583 4312